



Legacy Giving: Another Way to Serve!

Planned, Estate, and Legacy Giving Basics

Thursday, February 9, 2017, 9:06 am

St. Matthew Parish Hall, Hillsboro, Oregon

Prayer

In the name of the Father, Son, and Holy Spirit. Amen

Merciful Father,

With joy and thanksgiving,

We offer to you what you have given us,

our time, our talent, and treasure

signs of your gracious love;

Receive what we give to you and your Church like the one you have given us -
Jesus Christ our Lord. Amen

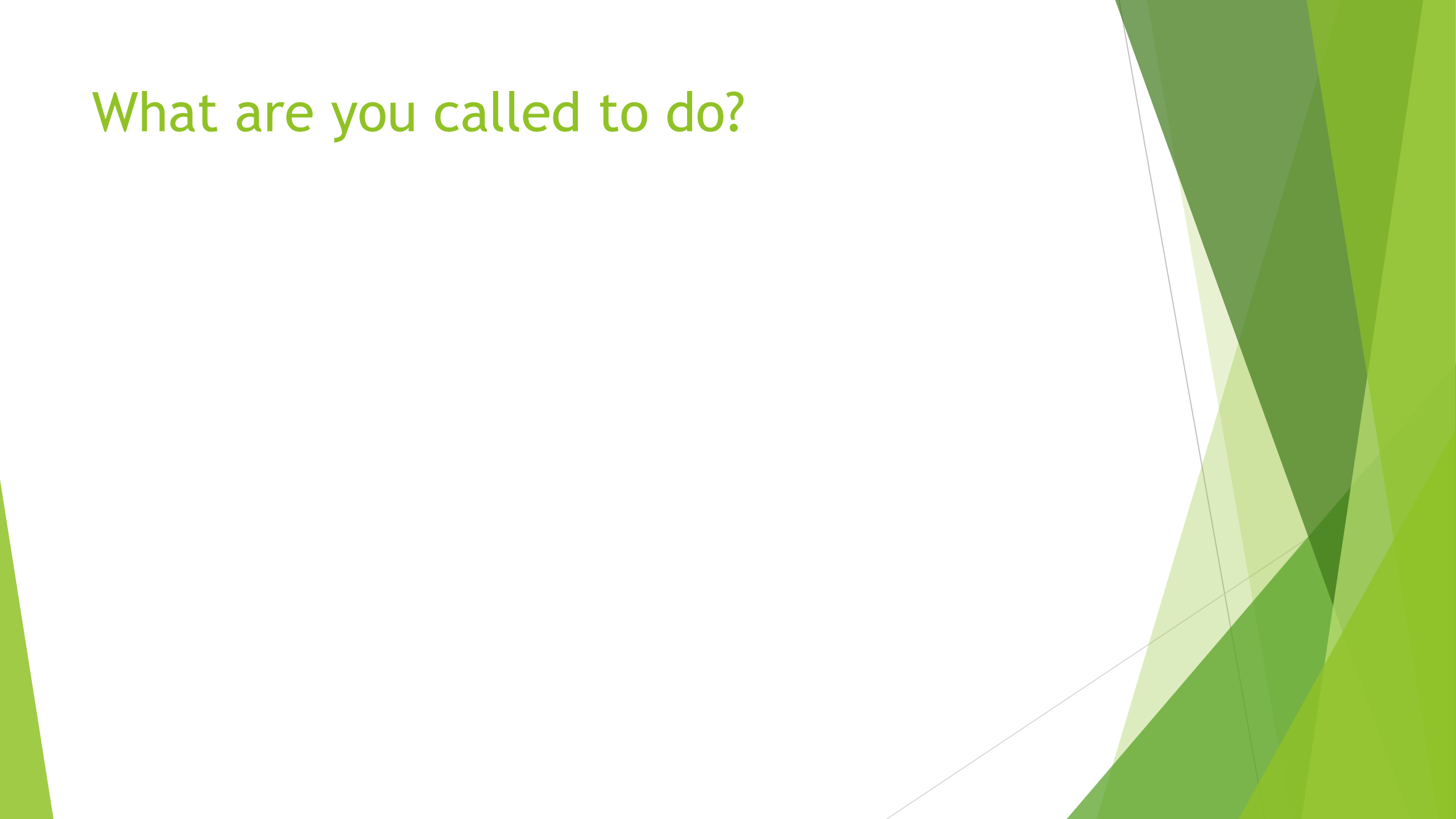
In the name of the Father, Son, and Holy Spirit. Amen

Overview of Today

- Welcome and Introductions
 - How did you come to St. Matthew?
- What are you called to do?
- What is a Legacy?
- Pre-work
- Tools for Giving

How did you come to St. Matthew?

What are you called to do?



Endowment?

- ▶ An endowment is
 - ▶ a glorified savings account
 - ▶ you do not spend the principle
 - ▶ spend a fraction of the earnings
 - ▶ for a particular purpose -> forever

Disclaimers & Values

- ▶ Disclaimer: Donors must consult with their professionals (financial planners, CPAs, lawyers, trust officers, CFPs, etc.) for tax, future obligations, and needs of donors.
- ▶ Does your Legacy plan reflect your values, faith, and philanthropy in that you lived your life?
 - ▶ If you supported organizations in you life, why not in your legacy plan
 - ▶ Preamble of trust/will - Statement of values and faith to be conveyed to your children and future generation
- ▶ Are all your children & grandchildren going to be treated equal?
 - ▶ Special needs
- ▶ When is the last time you looked at your legacy plan and has your life changed? Every 3 - 5 years or when something big changes in your life.

Basic Tools of Legacy Giving

- ▶ Cash
- ▶ I bequeath \$XXXXXXX or XX % to St Matthew Catholic Church, Hillsboro, Oregon, EIN #93-0429016, for the St Matthew Catholic School Endowment.
- ▶ Stuff
 - ▶ Personal property that can be converted to cash
- ▶ Life Insurance
- ▶ Retirement Plan Assets (IRAs)
 - ▶ Some IRAs will come to beneficiaries as straight income and income tax
- ▶ Savings Accts, CDs, Stocks, Bonds, Mutual Funds, Real Estate, Titled Stuff,
- ▶ Personal property - art, boats, precious metals, collectables, vehicles, timber, farms, livestock, mining - oil - gas rights, inventions, mission related gifts

Income producing gifts

- ▶ Provides the donor an income stream for one life or two:
 - ▶ Charitable Gift Annuities
 - ▶ Immediate, deferred, flexible
 - ▶ Charitable Remainder Annuity Trusts
 - ▶ Charitable Remainder Unitrusts
 - ▶ Pooled Income Funds
 - ▶ Other tools created by the Government to give a combination of charitable gifts and income for life.
 - ▶ Administered with the help the Archdiocese of Portland in Oregon.

Legacy of a Legacy & Become a member

- ▶ Considering tithing or giving 10% of any legacies that you receive to the School and Church.
- ▶ The Church will be forming a Legacy Society. Give a Legacy Gift or intention on one and become a member.

Please ...

- ▶ Tell your family what you are doing and why
- ▶ Remember your and your families future needs
- ▶ Consult with financial professionals
- ▶ Make your Legacy a statement of your faith and your values
- ▶ Do it NOW!

Questions???

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